# Crow River Stock Profile Sheet

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## Basic Information

Company Name: Exxon-Mobil

Ticker: XOM

Sector: Energy

Industry: Petroleum Integrated

Type of Holding: Core X Trade____ Option____

## Attachments

- ☐ Stock Selection Guide
- ☐ Pert/Trend Report
- ☐ FinViz Company Report
- ☐ 6 Month Daily Price Chart from StockCharts.com
- ☐ Perf Report from StockCharts w/S&P and Competitors

## Research Due Diligence

- ☐ Latest 10Q – Read the transcript or listen to the call
- ☐ Review news & articles from websites of choice
- ☐ Review and highlight Value Line commentary
- ☐ Review and highlight Morningstar commentary
- ☐ Review and highlight Argus commentary

## Ratings

- ☐ Manifest Quality Rating 62.7 lowered 12/11/09
- ☐ Navellier Rating (3 figure) F F D
- ☐ Value Line Industry Timeliness Rank 97
- ☐ Value Line Stock Timeliness Rank 4
- ☐ Value Line Beta .75

## Estimates

- ☐ Yahoo current and next year EPS 3.91 5.86
- ☐ Manifest 5-yr EPS & P/E 9.00 EPS 14 P/E
- ☐ Value Line 4-yr EPS & Avg. P/E 9.35 EPS 12 P/E
- ☐ Company's Guidance Numbers____

## Technicals

- ☐ Review 6 month, 1-yr & 3-yr charts on StockCharts
- ☐ Add your annotations to 6 month chart for review
- ☐ Where is our entry point for this stock? buy below $70
- ☐ Where is our ceiling for this stock? $107

## Competitors

- ☐ Pick 3 top competitors from Hoovers, Yahoo, Smart-Money, Morningstar, Manifest, etc.
- ☐ Verify they are true competitors by reading Value Line or Yahoo business summaries
- ☐ Perform Stock Comparison w/Toolkit
- ☐ Note what order they rank on MI for Quality Rating

## If this is a purchase for Options Trading...

- ☐ What is dividend yield? 2.4%
- ☐ Review dividend history/payout/strength
- ☐ What is Debt Rating? A++
- ☐ Are there attractive trade options available? yes

## Notes

- ☐ Exxon is one of the safest of the major oil producers with the best management, best reserves, best earnings
- ☐ potential, and best balance sheet with a mere 6% long term debt.
- ☐ Exxon's dividend payout is below that of Chevron and Conoco Phillips however, the company's dividend has
- ☐ doubled in the past 10 years with plenty of room to grow the dividend.
- ☐ Exxon has the best refining reserves of any of the major oil producers with properties in North America, Europe,

## Thesis for purchasing this stock:

- ☐ the Middle East, and Asia. Exxon has replaced more than 100% of its production in each of the last 15 years
- ☐ and its discovery costs are $7 per barrel below its peers.
- ☐ Exxon has entered into a definitive agreement to buy XTO Energy which will give it ownership rights to
- ☐ premier natural gas properties in the Texas panhandle.
- ☐ A Barron's article stated that the company's refining and chemical divisions could be worth $75 billion or
- ☐ $16 per share suggesting that the fair value for Exxon's common stock is $90 per share. The chemical
- ☐ division might be more valuable than DuPont if it were independent. Trends in the chemical division have been
- ☐ improving and management expects better results in 2010.
- ☐ Exxon is a low beta stock offering a high degree of safety and potential for price appreciation. I recommend
- ☐ the company as a core holding in our club portfolio.

## Thesis for purchasing this stock:

- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____

| 3-month review after sale | 6-month review after sale |
|---|---|
| ☐ Price at the time of sale____ | ☐ Price at the time of sale____ |
| ☐ Price at 3-mo. Anniversary____ | ☐ Price at 3-mo. Anniversary____ |
| What else do we want to review here? Quality ratings? Timeliness rankings? Change in Yahoo estimates? What? In his latest book, O'Neil covers the need to go back and review sold stocks to see if his thesis to sell was found to be correct or flawed. | What else do we want to review here? Quality ratings? Timeliness rankings? Change in Yahoo estimates? What? In his latest book, O'Neil covers the need to go back and review sold stocks to see if his thesis to sell was found to be correct or flawed. |

| | | | |
|---|---|---|---|
| Company | Exxon Mobil Corporation | Price Date | 12/29/09 |
| Study by | Ssostar | Data Date | 11/27/09 |
| Sector | Basic Materials | Data Source | StkCntrl |
| Industry | Major Integrated Oil & Gas | Reference | Morningstr |
| Preferred($M) | 0.0 | | |
| Common(M Shares) | 4,803.0 | % Insiders | 0.2 |
| Debt($M) | 7,185.0 | % Institutions | 49.8 |
| % to Tot.Cap. | 6.2 | Quality | 2.6 (Take Stock) |

Stock Study

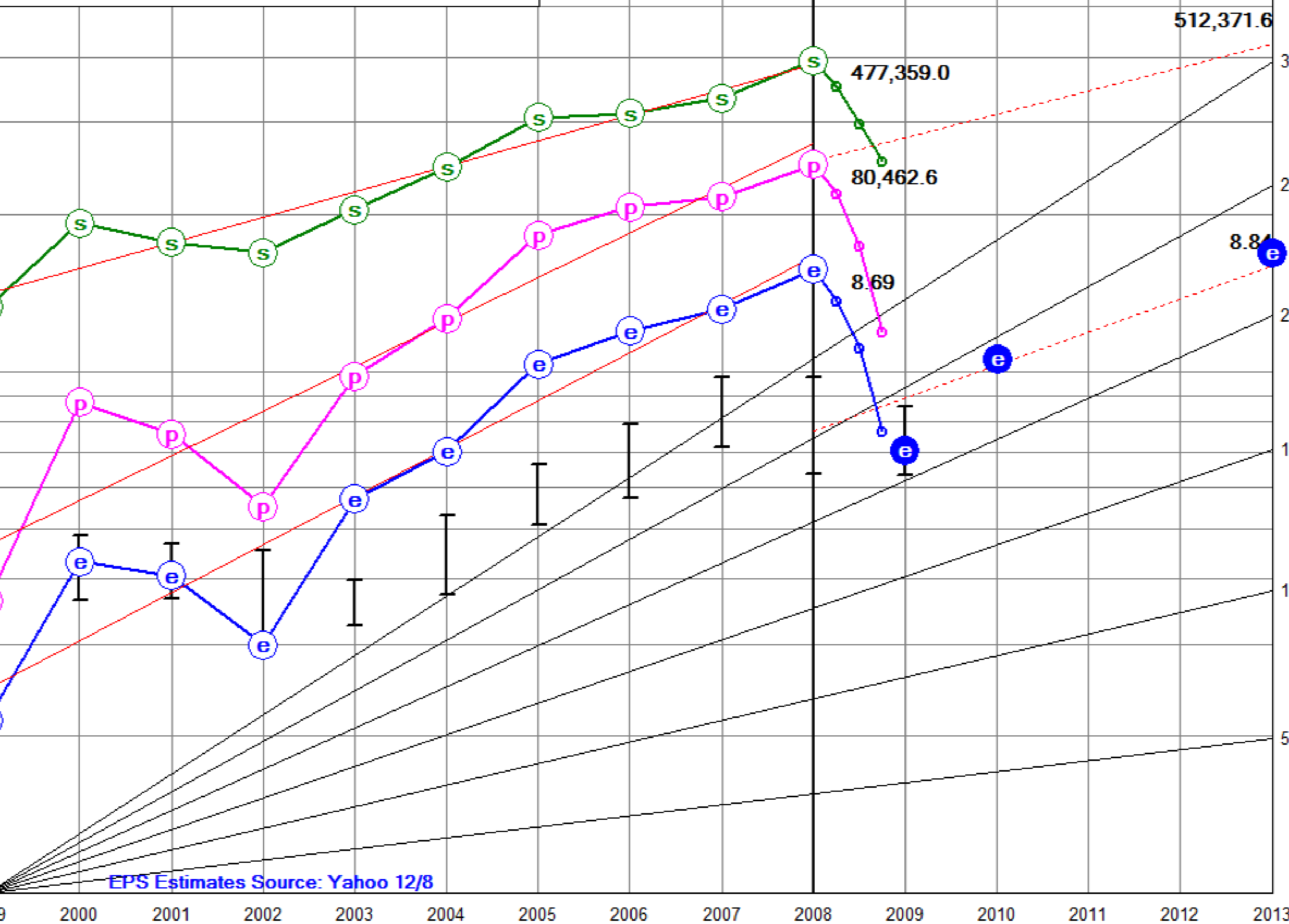
rowth Analysis

NYSE: XOM

FY 2009 Q3 (Ended 9/30/2009)

RECENT QUARTERLY FIGURES

| | SALES ($M) | EARNINGS PER SHARE ($) |
|---|---|---|
| Latest Quarter | 82,260.0 | 0.99 |
| Year Ago Quarter | 137,737.0 | 2.87 |
| Percentage Change | -40.3% | -65.7% |




Historical Sales Growth 11.9 %

Estimated Future Sales Growth 10.9 %

Sales Growth R^2 0.92

(3) Historical Earnings Per Share Growth 23.7 %

(4) Estimated Future Earnings Per Share Growth 15.8 %

(6) Earnings Per Share Growth R^2 0.91

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## QUALITY ANALYSIS

Company **Exxon Mobil Corporation** (XOM) 12/29/

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 5 YEAR AVG. | TREND UP / DOWN |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| % Pre-tax Profit on Sales | 7.3 | 12.1 | 11.5 | 8.7 | 12.8 | 13.7 | 15.9 | 17.7 | 17.2 | 16.9 | 16.3 | UP |
| % ROE (Beginning Yr) | | 26.2 | 22.0 | 15.4 | 28.3 | 28.4 | 35.9 | 36.5 | 36.6 | 38.4 | 35.2 | UP |
| % Debt to Equity | 13.1 | 10.1 | 9.5 | 8.8 | 5.2 | 4.8 | 5.4 | 5.6 | 5.7 | 5.9 | 5.5 | EVEN |

## PRICE, PRICE/EARNINGS RATIO and DIVIDEND ANALYSIS

CURRENT PRICE 68.840 52-WEEK HIGH 83.640 52-WEEK LOW 61.860

| iscal Year | High Price | Low Price | EPS | High P/E | Low P/E | Dividend | % Payout | % High Yield |
|---|---|---|---|---|---|---|---|---|
| 2004 | 51.7 | 36.5 | 3.89 | 13.3 | 9.4 | 1.060 | 27.3 | 2.9 |
| 2005 | 65.0 | 49.5 | 5.72 | 11.4 | 8.7 | 1.140 | 19.9 | 2.3 |
| 2006 | 77.2 | 55.9 | 6.62 | 11.7 | 8.4 | 1.280 | 19.3 | 2.3 |
| 2007 | 95.1 | 69.9 | 7.28 | 13.1 | 9.6 | 1.370 | 18.8 | 2.0 |
| 2008 | 95.0 | 62.4 | 8.69 | 10.9 | 7.2 | 1.550 | 17.8 | 2.5 |
| AVERAGE | | 54.8 | | 12.1 | 8.7 | | 20.6 | |

| | | | | | |
|---|---|---|---|---|---|
| AVERAGE P/E RATIO | 10.4 | PROJECTED P/E RATIO | 14.0 | TTM EPS | 4.25 |
| CURRENT P/E RATIO | 16.2 | PEG RATIO | 0.9 | FTM EPS | 4.92 |
| RELATIVE VALUE | 155.8% | PROJ. RELATIVE VALUE | 134.5% | | |

## EVALUATING REWARD and RISK over the next 5 years

**FUTURE HIGH PRICE ANALYSIS — NEXT 5 YEARS**

elected High P/E 12.1 X Estimated High Earnings/Share 8.84 = Forecast High Price $ 107.0

**FUTURE LOW PRICE ANALYSIS — NEXT 5 YEARS**

(a) Avg. Low P/E 8.7 (as adj.) X Estimated Low Earnings/Share ~~8.69~~ 4.25 = $ 36.9

(b) Average 5-Year Low Price = 54.8

(c) Recent Severe Low Price = 61.9

(d) Price Dividend Will Support = Present Divd. ÷ High Yield = 1.680 ÷ 0.029 = 57.8

Selected Estimated Low Price = $ 58.4

**PRICE RANGES**

Forecast High Price 107.0 - Estimated Low Price 58.4 = Range 48.6 25% of Range = 12.2

BUY (Lower 25% of Range) = 58.4 to 70.6

MAYBE (Middle 50% of Range) = 70.6 to 94.8

SELL (Upper 25% of Range) = 94.8 to 107.0

Current Price 68.840 is in the Buy Range

**REWARD/RISK ANALYSIS (Potential Gain vs. Risk of Loss)**

(Forecast High Price 107.0 - Current Price 68.840 ) ÷ ( Current Price 68.840 - Estimated Low Price 58.4 ) = 3.6 To 1

## TOTAL RETURN ANALYSIS

**CURRENT YIELD**

Present Full Year's Dividend $ 1.680 ÷ Current Price of Stock $ 68.840 = 2.4 % Present Yield or % Returned on Purchase Price

**AVERAGE YIELD OVER NEXT 5 YEARS**

(Avg. EPS Next 5 Years 6.59 X Avg. % Payout 20.6 ) ÷ Current Price $ 68.840 = 2.0 %

**% COMPOUND ANNUAL TOTAL RETURN**

Average Yield 1.7 % + Annual Appreciation 9.2 % = Compound Annual Total Return 10.9 %

**% PROJECTED AVERAGE RETURN**

Average Yield 2.0 % + Annual Appreciation 6.0 % = Projected Average Total Return 7.9 %